DEFENSE HEALTH INFORMATION MANAGEMENT SYSTEM

AHLTA Release 3.3 SRTS II
User's Manual

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The DHIMS Program Office is a component of the Military Health System Office of the Chief Information Officer.

SRTS II User's Manual
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1.0 SRTS II ADMINISTRATION

1.1 SRTS II Administration Overview

The Spectacle Request Transmission System (SRTS) II Administration module is used by the Enterprise Administrator (EA) to assign data to a facility so clinical staff can access the data within a particular facility. The ability to define and associate items used to produce eye wear orders must be defined by the EA before a clerk, technician, and/or a provider can manage and place orders in the SRTS II module. The Facility Profile tab of the Administration module allows authorized users to update their facility profile information. The Frame Defaults tab of the Administration module allows authorized users to add, update, and delete the set of frame defaults.

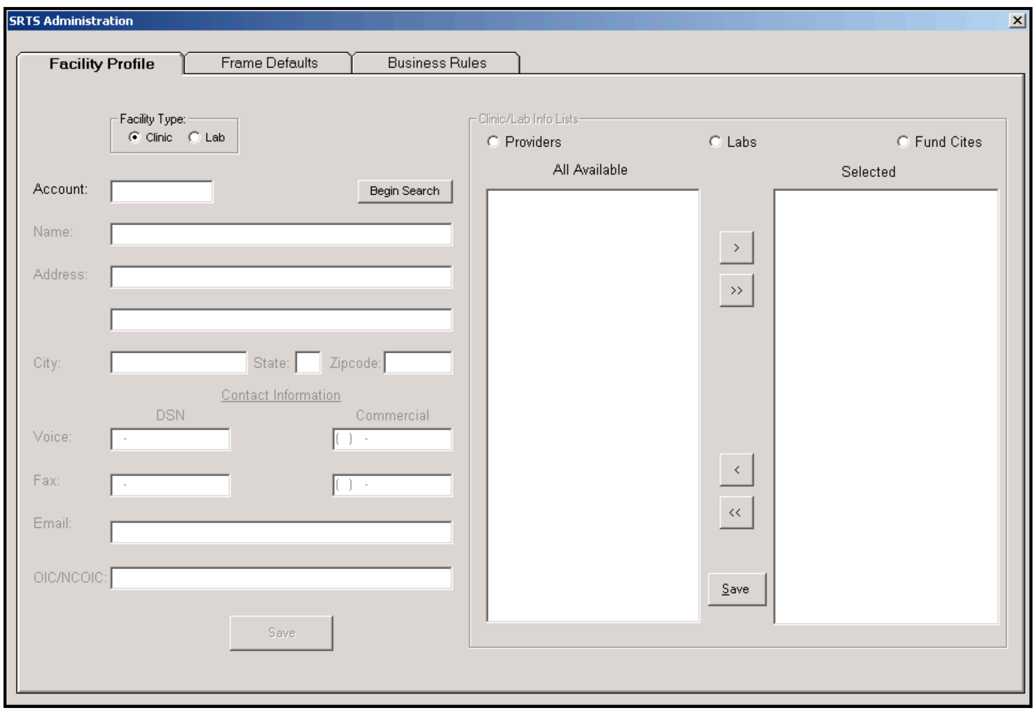

Figure 1–1: SRTS II Administration Window

1.2 Accessing SRTS II Administration

To access the SRTS II Administration module, the EA must log into the system using the assigned password and user identification (ID). Although access is permitted, no user except for the EA has access to the SRTS II Business Rules tab within the SRTS II Administration window.

Click **SRTS II OM** from the Folder List to access SRTS II Administration.

1.3 Assigning the Facility Profile

The SRTS II Administration Facility Profile tab allows an authorized user to display and/or modify the SRTS II Clinic/Lab profiles and to associate Providers, Labs, and Fund Cites. However, an EA must save the profile before an authorized user can associate providers, labs, and fund cites.

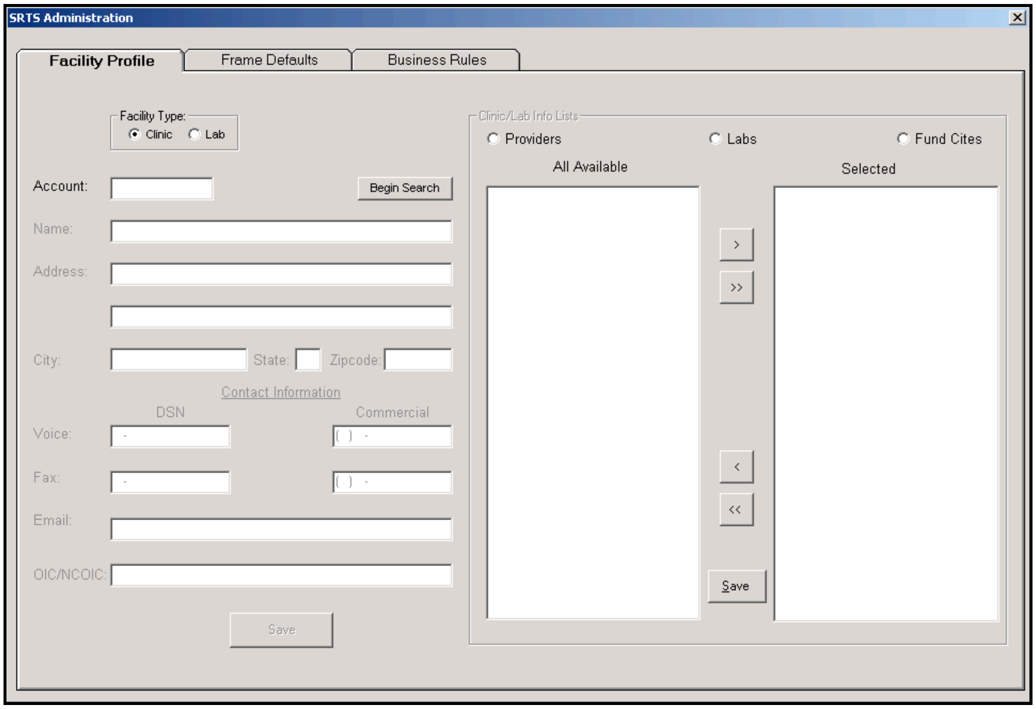

Figure 1–2: Facility Profile Tab

Follow the steps below to begin assigning facility profile information:

1. On the Folder List, click **SRTS II OM** to open the SRTS II Administration window.

Note: Although the SRTS II Administration window can be reached from either the Order Management (OM) or Order Entry (OE) modules, the EA must initiate the first facility association and authorized users can edit and modify facility information.

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2. Select the **Facility Type**.

Note: If your type of facility is a Lab, select **Facility Type of Lab**.

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3. Enter the Facility Account Number.
4. Click **Begin Search**. If the account number is accurate, the facility information populates with the information available.

5. Modify information in any of the fields, as necessary.
6. Click **Save**. A SRTS II Admin-Facility Linked alert displays.
7. In the Clinic/Lab Info Lists area, select **Providers**.

Note: EA users cannot select facilities-associated Providers, Labs, or Fund Cites. This is only allowed by Clinic/Lab users.

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8. From the All Available picklist, select the provider(s) you want to assign to the facility.
9. Click > or >> to assign the provider(s) to the facility.
10. Click **Save**.

Note: You must save the selections before assigning labs or fund cites.

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11. In the Clinic/Lab Info Lists area, select **Labs**.
12. From the All Available picklist, select the lab(s) you want to assign to the facility.
13. Click > or >> to assign the lab(s) to the facility.
14. Click **Save**.
15. In the Clinic/Lab Info Lists area, select **Fund Cites**.
16. From the All Available picklist, select the fund cite(s) you want to assign to the facility.
17. Click > or >> to assign the fund cite(s) to the facility.
18. Close the SRTS II Administration window. The main window begins loading data.

Note: If you are logged in as an EA, you cannot access any other SRTS II screens.

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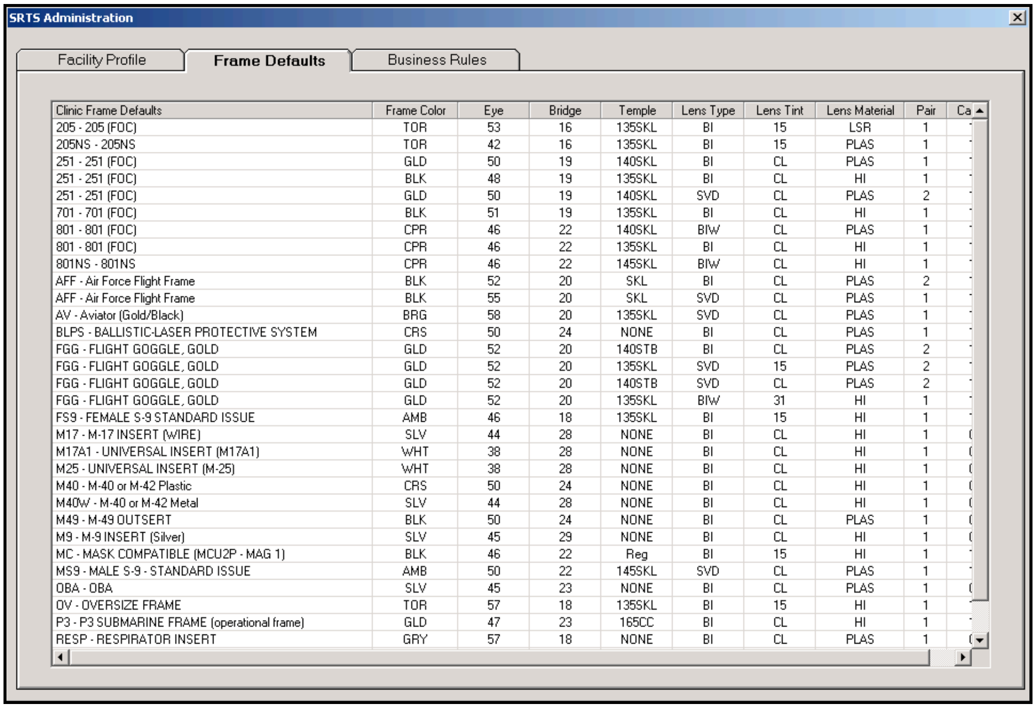
19. View the loaded data.

1.4 Adding Frame Type Defaults

The SRTS II Administration Frame Defaults tab allows an authorized Clinic/Lab user to create, delete, edit, and add favorite default frames for a facility. All functions on this tab are accessed by right-clicking on the desired tab.



Clinic Frame Defaults	Frame Color	Eye	Bridge	Temple	Lens Type	Lens Tint	Lens Material	Pair	Ca
205 - 205 (FOC)	TOR	53	16	135SKL	BI	15	LSR	1	
205NS - 205NS	TOR	42	16	135SKL	BI	15	PLAS	1	
251 - 251 (FOC)	GLD	50	19	140SKL	BI	CL	PLAS	1	
251 - 251 (FOC)	BLK	48	19	135SKL	BI	CL	HI	1	
251 - 251 (FOC)	GLD	50	19	140SKL	SVD	CL	PLAS	2	
701 - 701 (FOC)	BLK	51	19	135SKL	BI	CL	HI	1	
801 - 801 (FOC)	CPR	46	22	140SKL	BIW	CL	PLAS	1	
801 - 801 (FOC)	CPR	46	22	135SKL	BI	CL	HI	1	
801NS - 801NS	CPR	46	22	145SKL	BIW	CL	HI	1	
AFF - Air Force Flight Frame	BLK	52	20	SKL	BI	CL	PLAS	2	
AFF - Air Force Flight Frame	BLK	55	20	SKL	SVD	CL	PLAS	1	
AV - Aviator (Gold/Black)	BRG	58	20	135SKL	SVD	CL	PLAS	1	
BLPS - BALLISTIC-LASER PROTECTIVE SYSTEM	CRS	50	24	NONE	BI	CL	PLAS	1	
FGG - FLIGHT GOGGLE, GOLD	GLD	52	20	140STB	BI	CL	PLAS	2	
FGG - FLIGHT GOGGLE, GOLD	GLD	52	20	135SKL	SVD	15	PLAS	2	
FGG - FLIGHT GOGGLE, GOLD	GLD	52	20	140STB	SVD	CL	PLAS	2	
FGG - FLIGHT GOGGLE, GOLD	GLD	52	20	135SKL	BIW	31	HI	1	
FS9 - FEMALE S-9 STANDARD ISSUE	AMB	46	18	135SKL	BI	15	HI	1	
M17 - M-17 INSERT (WIRE)	SLV	44	28	NONE	BI	CL	HI	1	
M17A1 - UNIVERSAL INSERT (M17A1)	WHT	38	28	NONE	BI	CL	HI	1	
M25 - UNIVERSAL INSERT (M-25)	WHT	38	28	NONE	BI	CL	HI	1	
M40 - M-40 or M-42 Plastic	CRS	50	24	NONE	BI	CL	HI	1	
M40W - M-40 or M-42 Metal	SLV	44	28	NONE	BI	CL	HI	1	
M49 - M-49 OUTSERT	BLK	50	24	NONE	BI	CL	PLAS	1	
M9 - M-9 INSERT (Silver)	SLV	45	29	NONE	BI	CL	HI	1	
MC - MASK COMPATIBLE (MCU2P - MAG 1)	BLK	46	22	Reg	BI	15	HI	1	
MS9 - MALE S-9 - STANDARD ISSUE	AMB	50	22	145SKL	SVD	CL	PLAS	1	
OBA - OBA	SLV	45	23	NONE	BI	CL	PLAS	1	
OV - OVERSIZE FRAME	TOR	57	18	135SKL	BI	15	HI	1	
P3 - P3 SUBMARINE FRAME (operational frame)	GLD	47	23	165CC	BI	CL	HI	1	
RESP - RESPIRATOR INSERT	GRY	57	18	NONE	BI	CL	PLAS	1	

Figure 1–3: Frame Defaults Tab

Follow the steps below to add frame type defaults as an EA:

Note: Clinic/Lab users must navigate to the Administration window.

1. On the Folder List, click **SRTS II OM** to open the SRTS II Administration window.
2. Click **Frame Defaults** to open the Frame Defaults tab.
3. Right-click and select **Insert** to open the SRTS II Frame Type Defaults (Add) window.

Note: To edit frame defaults, right-click and select **Edit**. To delete frame defaults, right-click and select **Delete**.

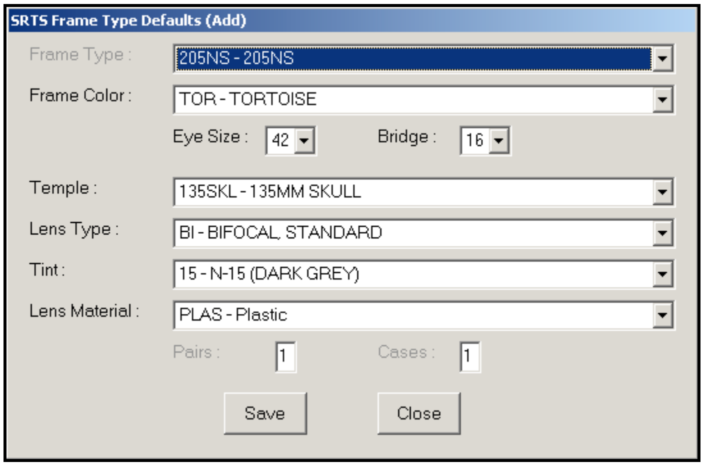


Figure 1–4: SRTS II Frame Type Defaults (Add) Window

4. Select a Frame Type from the drop-down list.

Note: The remaining fields in the window are populated with default information.

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5. Change the default information for the following fields, if applicable:
   - Frame Color
   - Eye Size
   - Bridge
   - Temple
   - Lens Type
   - Tint
   - Lens Material
   - Pairs
   - Cases
6. Click **Save**.
7. Click **Close**.

1.5 Defining Business Rules

The SRTS II Administration Business Rules tab is used by the EA to manage available data values, frame associations, and specific business rules. Each button on this tab displays a window for adding, modifying, or deleting data. The data is divided into two areas: data dependencies and values. The dependencies functions support associating values, while the values section is used to define allowable values.

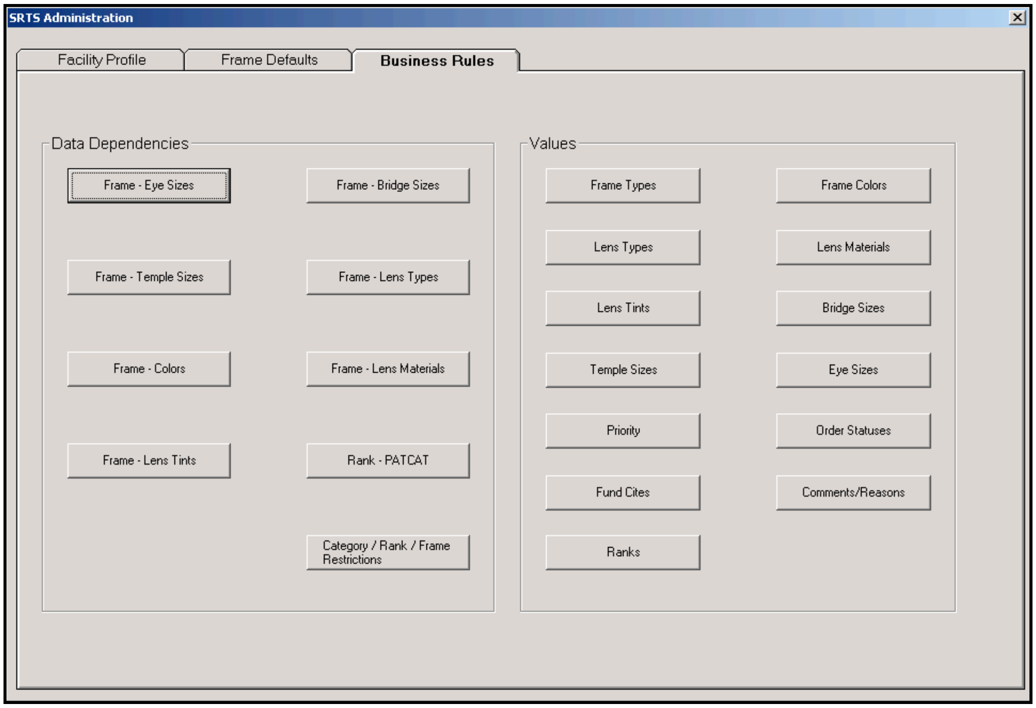

Figure 1–5: Business Rules Tab

Follow the steps below to set business rules:

1. On the Folder List, click **SRTS II OM** to open the SRTS II Administration window.
2. Click **Business Rules** to open the Business Rules tab.
3. Add Values.
4. Add Data Dependencies.

1.5.1 Frame—Eye Sizes

Follow the steps below to set eye size data dependencies:

1. Click the **Frame - Eye Sizes** button in the Data Dependencies section of the Business Rules tab.
2. From the All Frame Types picklist, select a frame type.
3. From the All Eye Sizes picklist, select an eye size value.
4. Double-click the selection to add the value to the Eye Sizes for selected Frame Type list.
5. Double-click on an item in the Eye Sizes for selected Frame Type to add or modify the **B** value.

Note: You can add multiple eye size values for a selected frame type.

6. Click **Save**.
7. Click **Close** to return to the Business Rules tab.

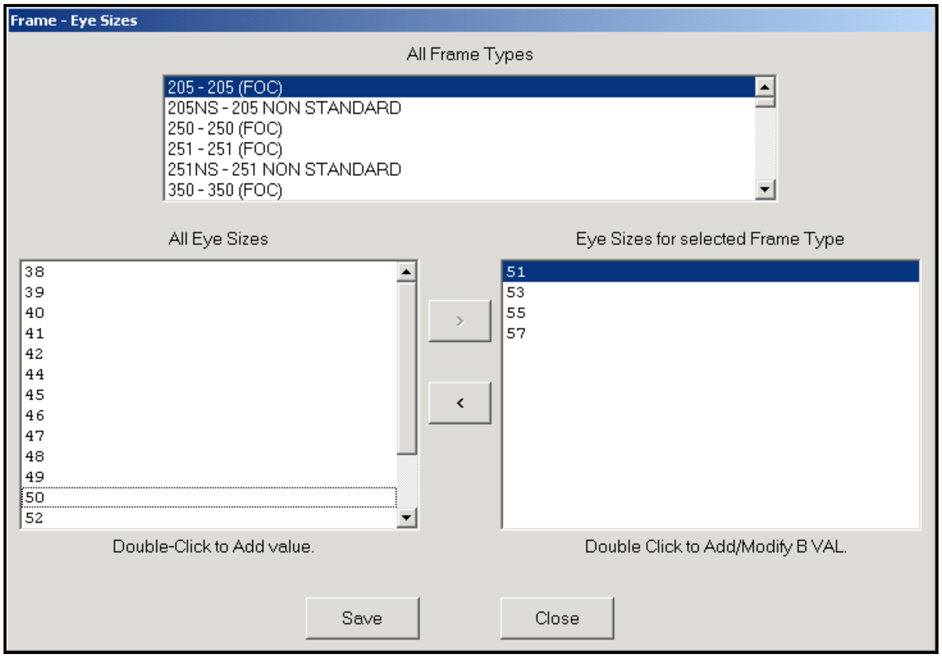

Figure 1–6: Frame—Eye Sizes Window

1.5.2 Frame—Temple Sizes

Follow the steps below to set temple size data dependencies:

1. Click on the **Frame - Temple Sizes** button in the Data Dependencies section of the Business Rules tab.
2. From the All Frame Types picklist, select a frame type.
3. From the All Temple Sizes picklist, select a temple size value.
4. Double-click the selection to add the value to the Temple Sizes for selected Frame Type list.

Note: You can add multiple temple size values for a selected frame type.

5. Click **Save**.
6. Click **Close** to return to the Business Rules tab.

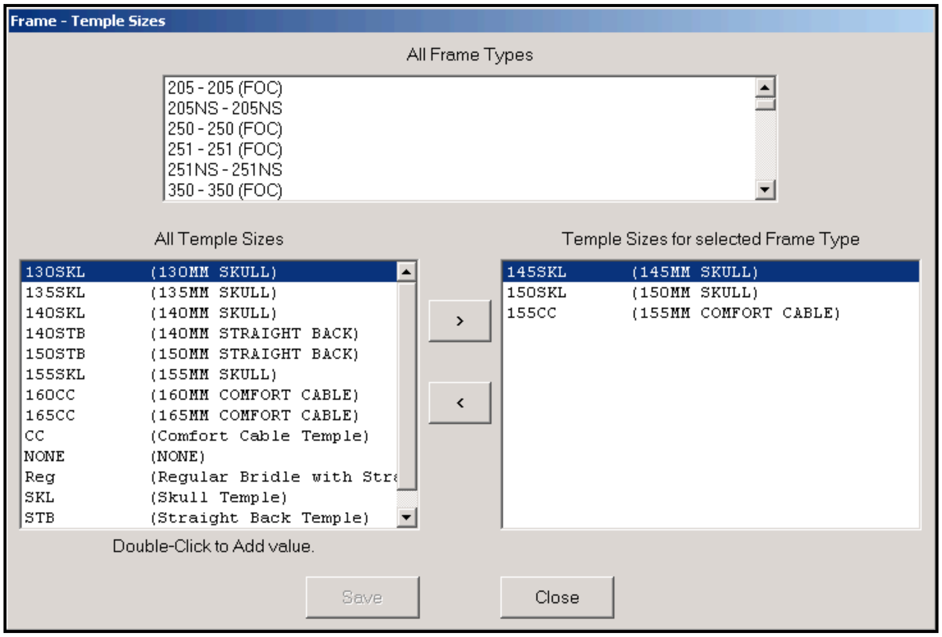

Figure 1–7: Frame—Temple Sizes Window

1.5.3 Frame—Colors

Follow the steps below to set color data dependencies:

1. Click on the **Frame - Colors** button in the Data Dependencies section of the Business Rules tab.
2. From the All Frame Types picklist, select a frame type.
3. Form the All Frame Colors picklist, select a color value.
4. Double-click the selection to add the value to the Frame Colors for selected Frame Type list.

Note: You can add multiple frame color values for a selected frame type.

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5. Click **Save**.
6. Click **Close** to return to the Business Rules tab.

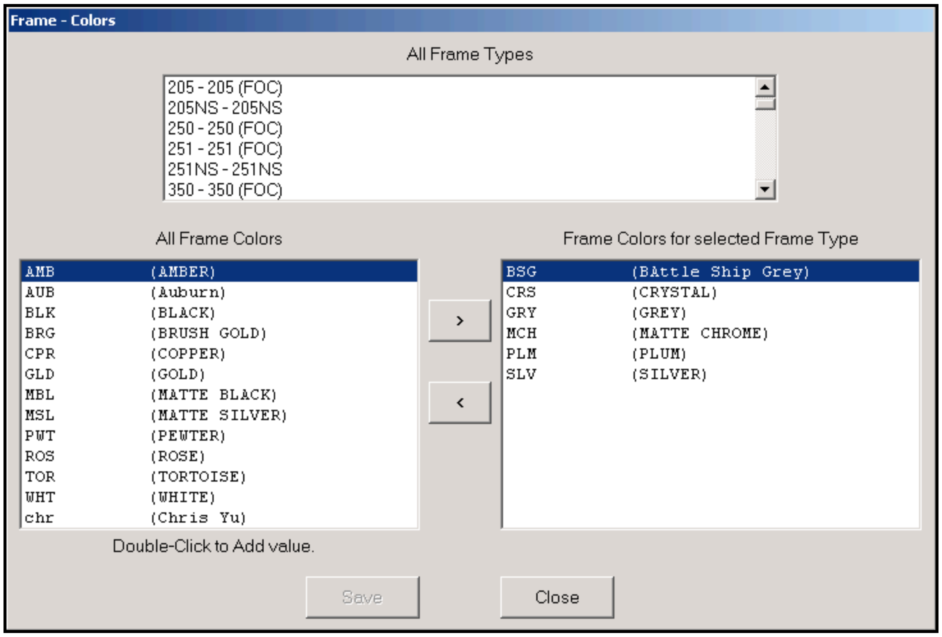

Figure 1–8: Frame—Colors Window

1.5.4 Frame—Lens Tints

Follow the steps below to set lens tint data dependencies:

1. Click on the **Frame - Lens Tints** button in the Data Dependencies section of the Business Rules tab.
2. From the All Frame Types picklist, select a frame type.
3. From the All Lens Tints picklist, select a lens tint value.
4. Double-click the selection to add the value to the Lens Tints for selected Frame Type list.
5. At the prompt for Tint Restrictions — Max # Pairs, enter the appropriate value and click **OK**.

Note: You can add multiple frame lens tint values for a selected frame type.

Note: To modify tint restrictions, double-click the selection in the Lens Tints for selected Frame Type list.

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6. Click **Save**.
7. Click **Close** to return to the Business Rules tab.

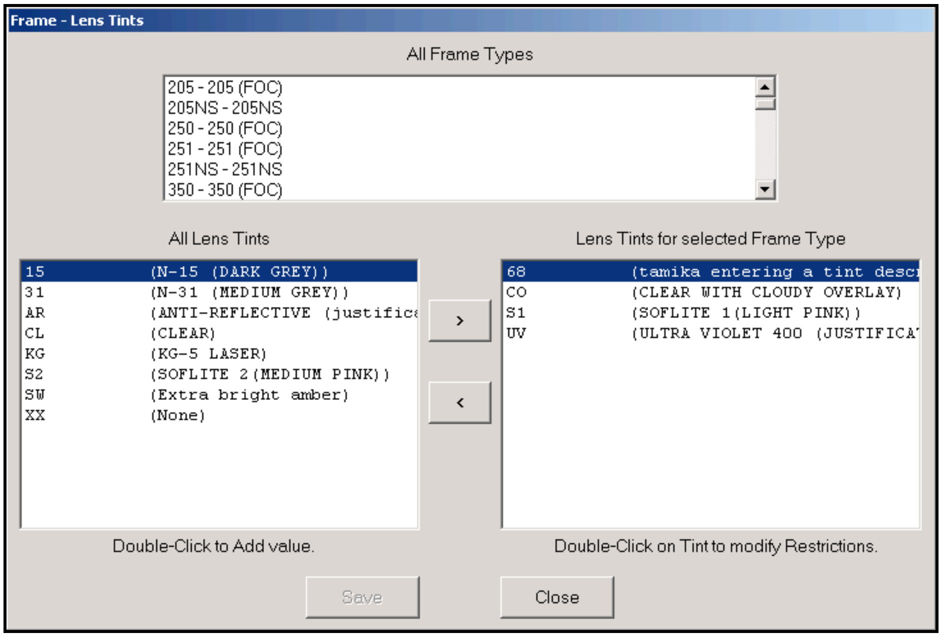

Figure 1–9: Frame—Lens Tints Window

1.5.5 Frame—Bridge Sizes

Follow the steps below to set bridge size data dependencies:

1. Click on the **Frame - Bridge Size** button in the Data Dependencies section of the Business Rules tab.
2. From the All Frame Types picklist, select a frame type.
3. From the All Bridge Sizes picklist, select a bridge size value.
4. Double-click the selection to add the value to the Bridge Sizes for selected Frame Type list.

Note: You can add multiple frame bridge size values for a selected frame type.

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5. Click **Save**.
6. Click **Close** to return to the Business Rules tab.

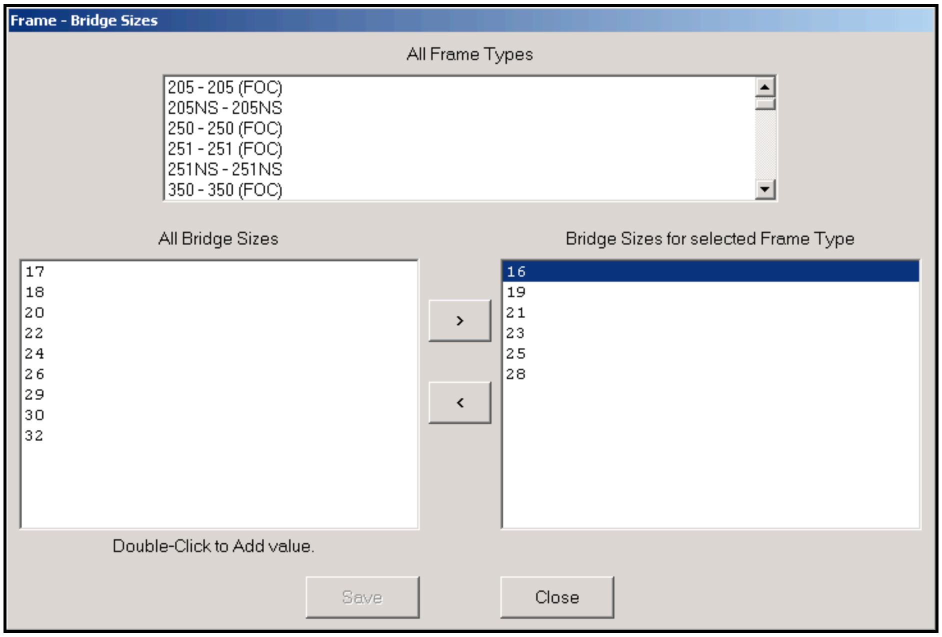

Figure 1–10: Frame—Bridge Sizes Window

1.5.6 Frame—Lens Types

Follow the steps below to set lens type data dependencies:

1. Click on the **Frame—Lens Types** button in the Data Dependencies section of the Business Rules tab.
2. From the All Frame Types picklist, select a frame type.
3. From the All Lens Types picklist, select a lens type value.
4. Double-click the selection to add the value to the Lens Types for selected Frame Type list.
5. At the SRTS II Lens Cross Reference prompt, enter the appropriate values for Segment Height—Lower Bound, Upper Bound, and increment; click **OK**.

Note: You can add multiple frame lens type values for a selected frame type.

Note: To modify lens type restrictions, double-click the selection in the Lens Tints for selected Frame Type list.

6. Click **Save**.
7. Click **Close** to return to the Business Rules tab.

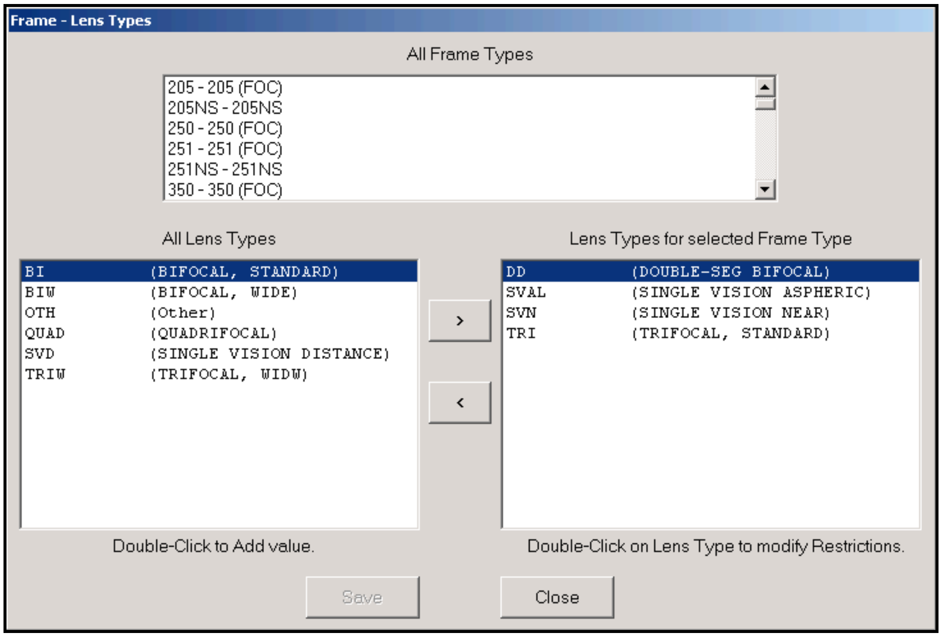

Figure 1–11: Frame—Lens Types Window

1.5.7 Frame—Lens Materials

Follow the steps below to set lens material data dependencies:

1. Click on the **Frame - Lens Materials** button in the Data Dependencies section of the Business Rules tab.
2. From the All Frame Types picklist, select a frame type.
3. From the All Lens Materials picklist, select a lens material value.
4. Double-click the selection to add the value to the Lens Materials for selected Frame Type list.

Note: You can add multiple frame lens material values for a selected frame type.

5. Click **Save**.
6. Click **Close** to return to the Business Rules tab.

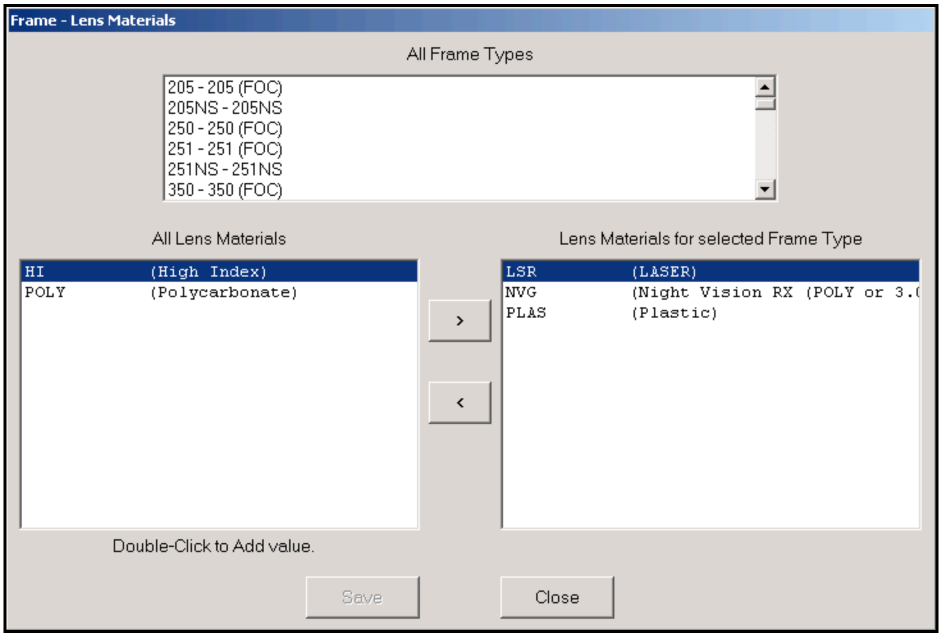

Figure 1–12: Frame—Lens Materials Window

1.5.8 Rank—PATCAT

Follow the steps below to set patient category data dependencies:

1. Click on the Rank - PATCAT button in the Data Dependencies section of the Business Rules tab.
2. From the Patient Categories picklist, select a category.
3. From the All Ranks picklist, select a rank value.
4. Double-click the selection to add the value to the Ranks for selected Patient Status list.
5. At the Status/Rank Restrictions prompt, enter the appropriate value for Max Orders per Year; click **OK**.

Note: You can add multiple patient rank values for a selected patient status.

Note: To modify rank restrictions, double-click the selection in the Ranks for selected Patient list.

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6. Click **Save**.
7. Click **Close** to return to the Business Rules tab.

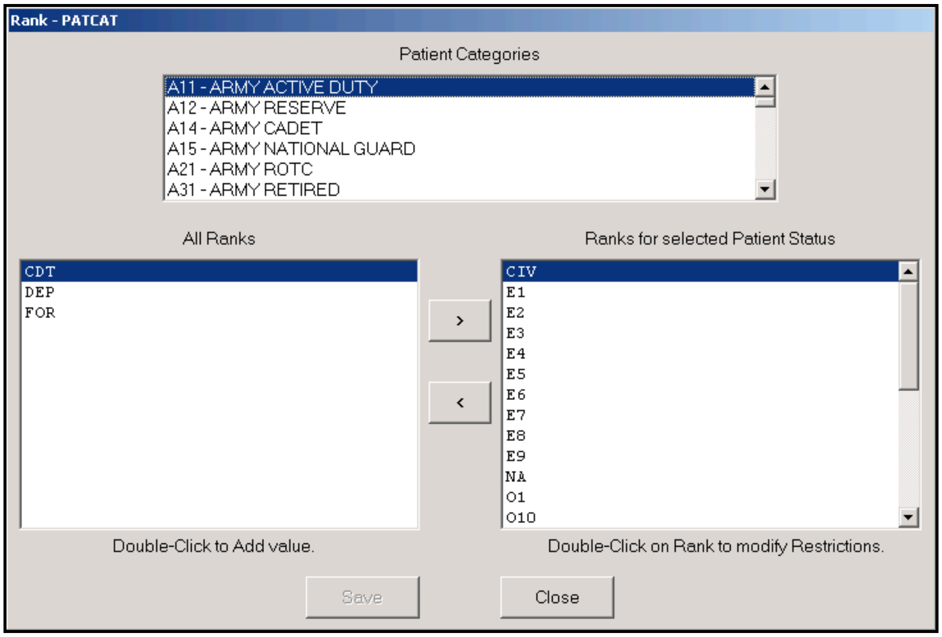

Figure 1–13: Rank—PATCAT Window

1.5.9 Frame Restrictions

Follow the steps below to set frame restriction data dependencies:

1. Click on the Category/Rank/Frame Restrictions button in the Data Dependencies section of the Business Rules tab.
2. Select a Patient Status from the drop-down list.
3. Select a Patient Rank from the drop-down list.
4. From the All Frames Type picklist, select a frame you want to allow for the selected patient status/rank.
5. Double-click the selection to open the Frame Restrictions window.
6. Select a Default Priority from the drop-down list.
7. Adjust maximum orders/pairs/cases information, if necessary.
8. Click **OK** to add the frame restriction to the Frame Types Pertaining to Status and Rank list.

Note: You can add multiple frame restrictions for a selected patient status.

Note: To modify frame restrictions, double-click the selection in the Frame Types Pertaining to Status and Rank list.

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9. Click **Save**.

10. Click **Close** to return to the Business Rules tab.

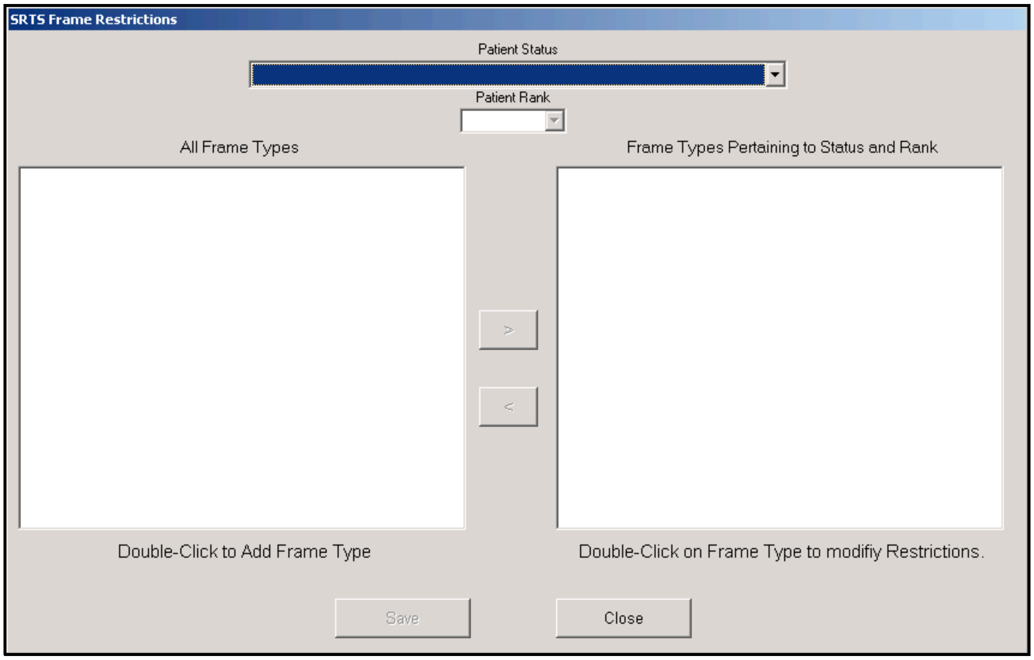

Figure 1–14: SRTS II Frame Restrictions Window

1.5.10 Frame Types

Follow the steps below to add frame type values:

1. Click the **Frame Types** button in the Values section of the Business Rules tab.
2. In the Frame Type picklist, double-click the add entry line.
3. Enter a Frame Type.
4. Enter a Description for the type of frame.
5. Enter any applicable Notes.
6. Enter a Default Segment Height.
7. Enter a value for Max Pairs.

Note: To edit a frame type, double-click the frame type and update the applicable fields.

8. Enter a "*Y*" or "*N*" to indicate whether patient's eligibility should be checked.

Note: To delete a frame type, select the row of the frame type and click **Delete**.

9. Click **Save**.

10. Click **Close** to return to the Business Rules tab.

Note: When deleting values, the user will not be allowed to delete a value if it is used in an existing order.

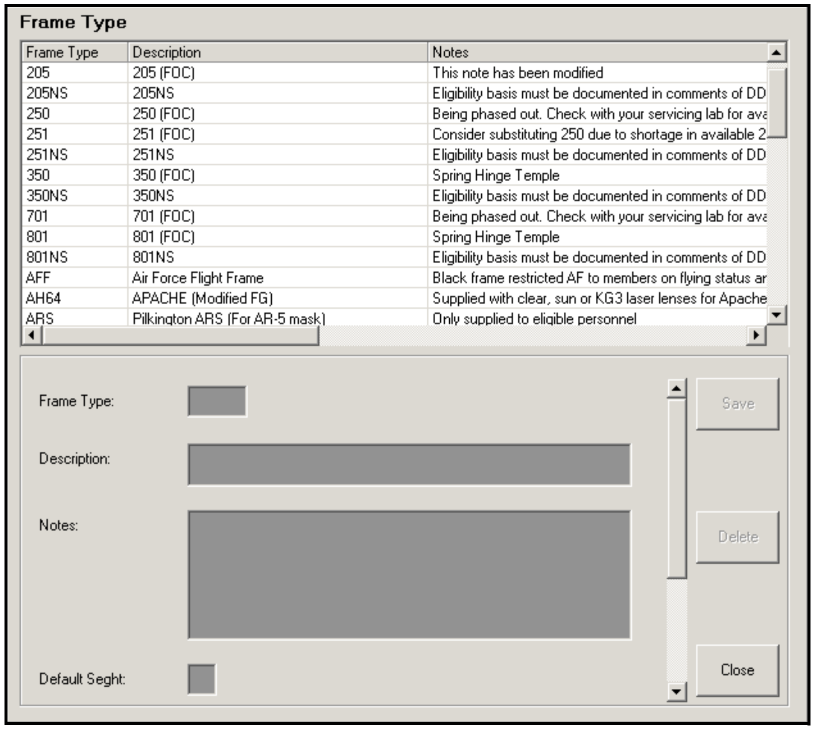

Figure 1–15: Frame Types Window

1.5.11 Lens Types

Follow the steps below to add lens type values:

1. Click the **Lens Types** button in the Value section of the Business Rules tab.
2. In the Lens Type picklist, double-click the add entry line.
3. Enter a Lens Type.
4. Enter a Description of the lens type.
5. Click **Save**.

Note: To edit a lens type, double-click the lens type and update the applicable fields.

Note: To delete a lens type, select the Lens Tints Entry and click **Delete**.

6. Click **Close** to return to the Business Rules tab.

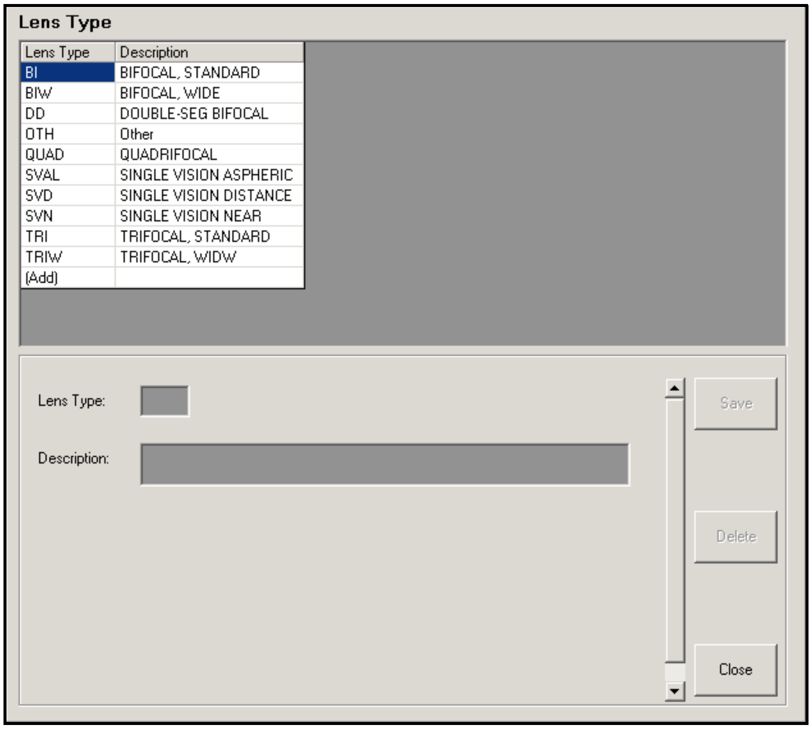

Figure 1–16: Lens Types Window

1.5.12 Lens Tints

Follow the steps below to add lens tint values:

1. Click the **Lens Tints** button in the Value section of the Business Rules tab.
2. In the Tint picklist, double-click the add line entry.
3. Enter a Tint Code.
4. Enter a Description of the lens tint.
5. Click **Save**.

Note: To edit a lens tint, double-click the lens tint and update the applicable fields.

Note: To delete a lens tint, select the Lens Tints entry and click **Delete**.

6. Click **Close** to return to the Business Rules tab.

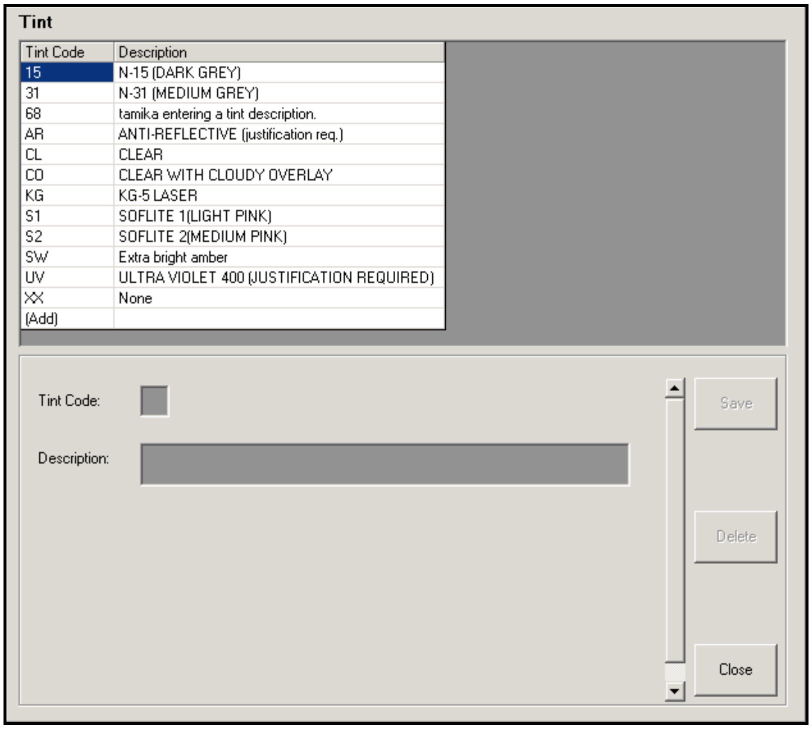

Figure 1–17: Tint Window

1.5.13 Temple Sizes

Follow the steps below to add temple values:

1. Click the **Temple Sizes** button in the Value section of the Business Rules tab.
2. In the Temple picklist, double-click the add line entry.
3. Enter a Temple value.
4. Enter a Description of the temple value.
5. Click **Save**.

Note: To edit a temple value, double-click the value and update the applicable fields.

Note: To delete a temple value, select the Temple Size entry and click **Delete**.

6. Click **Close** to return to the Business Rules tab.

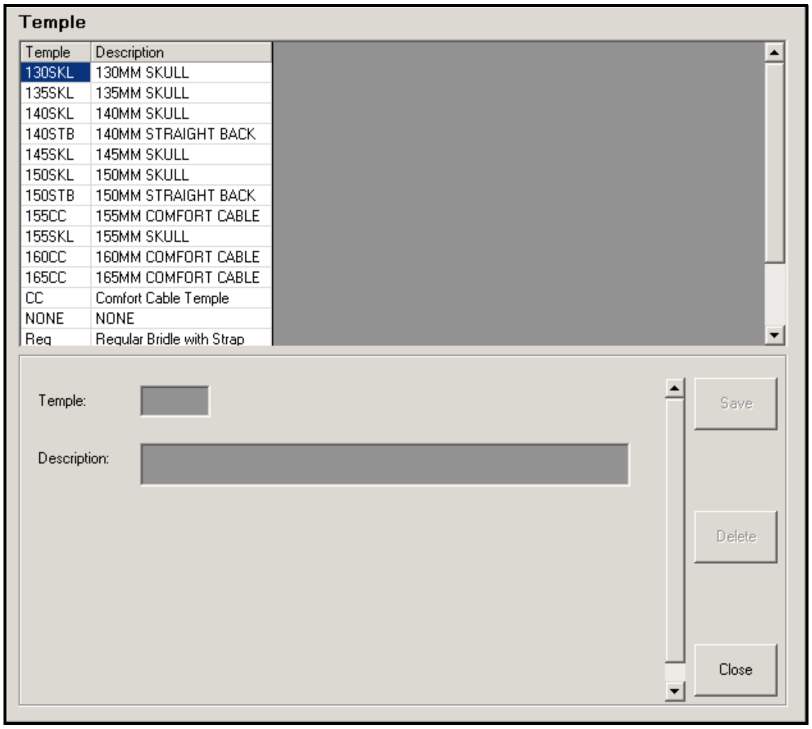

Figure 1–18: Temple Window

1.5.14 Priority

Follow the steps below to add priority values:

1. Click the **Priority** button in the Value section of the Business Rules tab.
2. In the **Priority** picklist, double-click the add line entry.
3. Enter a Priority value.
4. Enter a Description of the priority value.
5. Click **Save**.

Note: To edit a priority value, double-click the value and update the applicable fields.

Note: To delete a priority value, select the Priority entry and click **Delete**.

6. Click **Close** to return to the Business Rules tab.

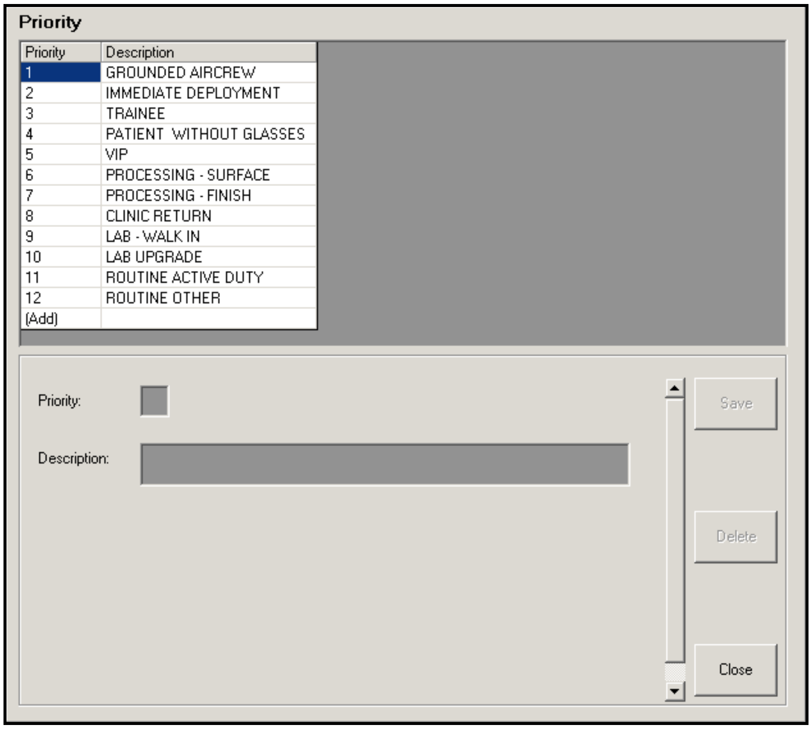

Figure 1–19: Priority Window

1.5.15 Fund Cites

Follow the steps below to add fund cite values:

1. Click the **Fund Cites** button in the Value section of the Business Rules tab.
2. In the Fund Cite picklist, double-click the add line entry.
3. Enter the Fund Cite ID value.
4. Enter the Fund Cite Name.
5. Click **Save**.

Note: To edit a fund cite value, double-click the value and update the applicable fields.

Note: To delete a fund cite value, select the Fund Cite entry and click **Delete**.

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6. Click **Close** to return to the Business Rules tab.

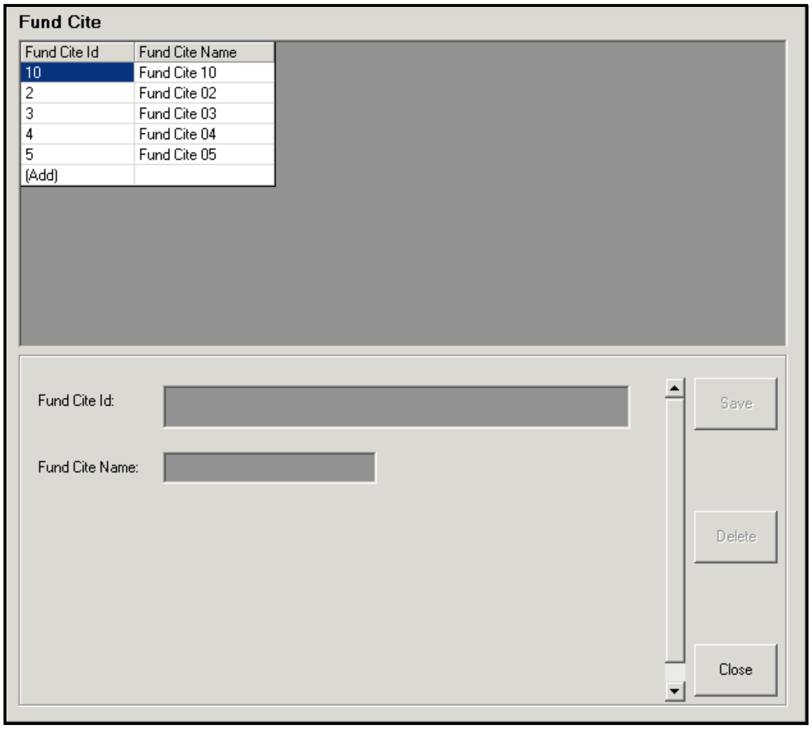

Figure 1–20: Fund Cite Window

1.5.16 Ranks

Follow the steps below to add rank values:

1. Click the **Ranks** button in the Value section of the Business Rules tab.
1. In the Rank picklist, double-click the add line entry.
2. Enter the Rank Code value.
3. Enter a Description of the rank code value.
4. Click **Save**.

Note: To edit a rank value, double-click the value and update the applicable fields.

Note: To delete a rank value, select the Ranks Entry and click **Delete**.

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5. Click **Close** to return to the Business Rules tab.

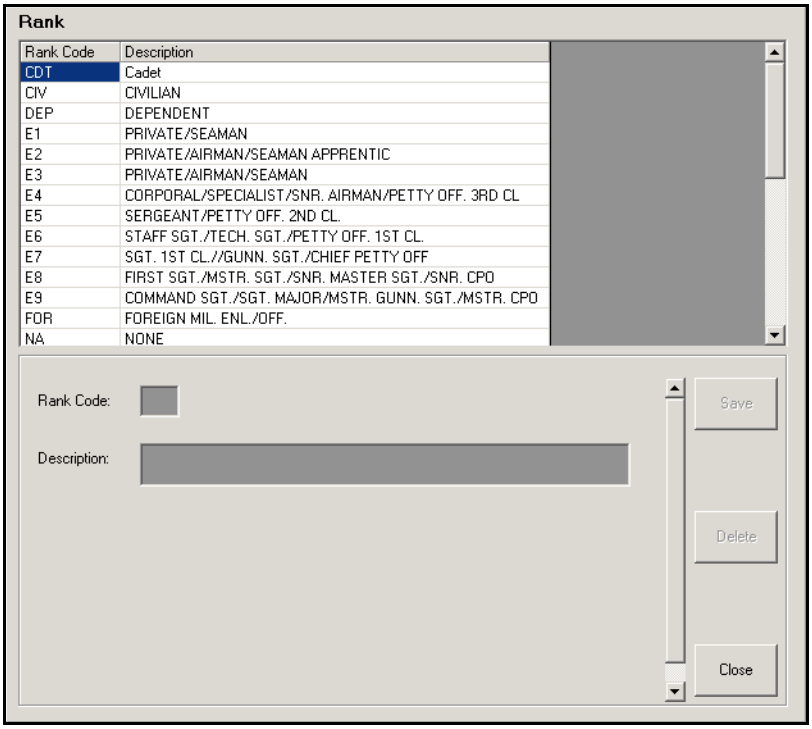

Figure 1–21: Rank Window

1.5.17 Frame Colors

Follow the steps below to add frame color values:

1. Click the **Frame Colors** button in the Value section of the Business Rules tab.
2. In the Frame Color picklist, double-click the add line entry.
3. Enter the Frame Color value.
4. Enter a Description of the color value.
5. Click **Save**.

Note: To edit a frame color value, double-click the value and update the applicable fields.

Note: To delete a frame color value, select the Frame Color entry and click **Delete**.

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6. Click **Close** to return to the Business Rules tab.

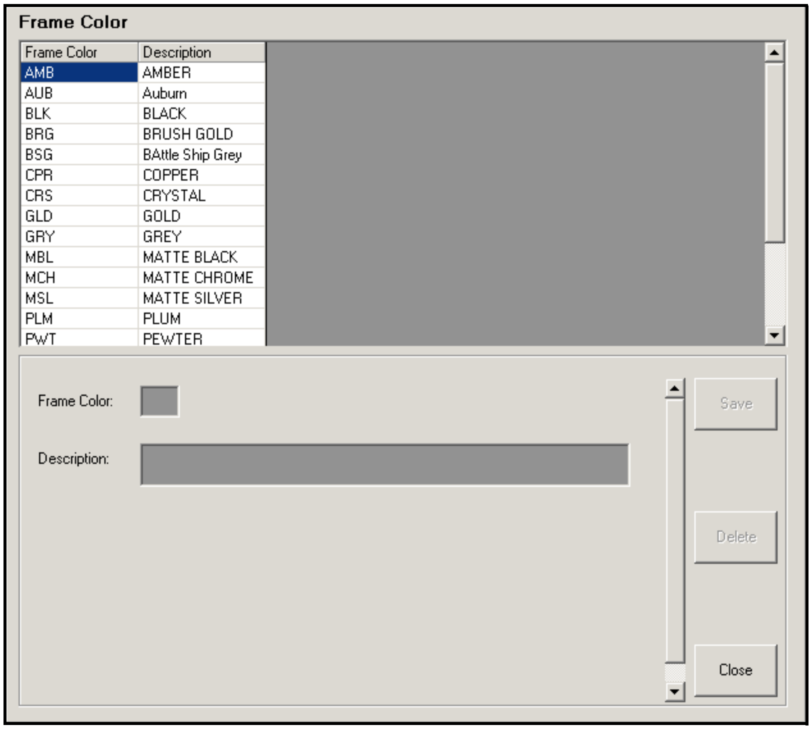

Figure 1–22: Frame Color Window

1.5.18 Lens Materials

Follow the steps below to add lens material values:

1. Click the **Lens Materials** button in the Value section of the Business Rules tab.
2. In the Lens Materials picklist, double-click the add line entry.
3. Enter the Lens Material value.
4. Enter a Description of the material value.
5. Click **Save**.

Note: To edit a lens material value, double-click the value and update the applicable fields.

Note: To delete a lens material value, select the Lens Materials entry and click **Delete**.

6. Click **Close** to return to the Business Rules tab.

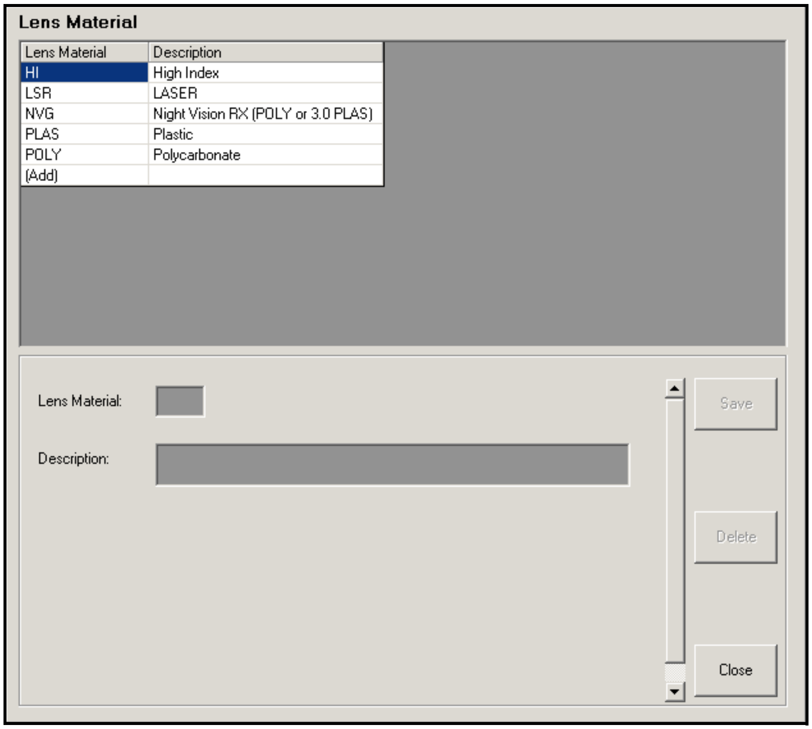

Figure 1–23: Lens Material Window

1.5.19 Bridge Sizes

Follow the steps below to add bridge size values:

1. Click the **Bridge Sizes** button in the Value section of the Business Rules tab.
2. In the Bridge picklist, double-click the add line entry.
3. Enter the Bridge Size value.
4. Click **Save**.

Note: To edit a bridge size value, double-click the value and update the applicable fields.

Note: To delete a bridge size value, select the Bridge Size entry and click **Delete**.

5. Click **Close** to return to the Business Rules tab.

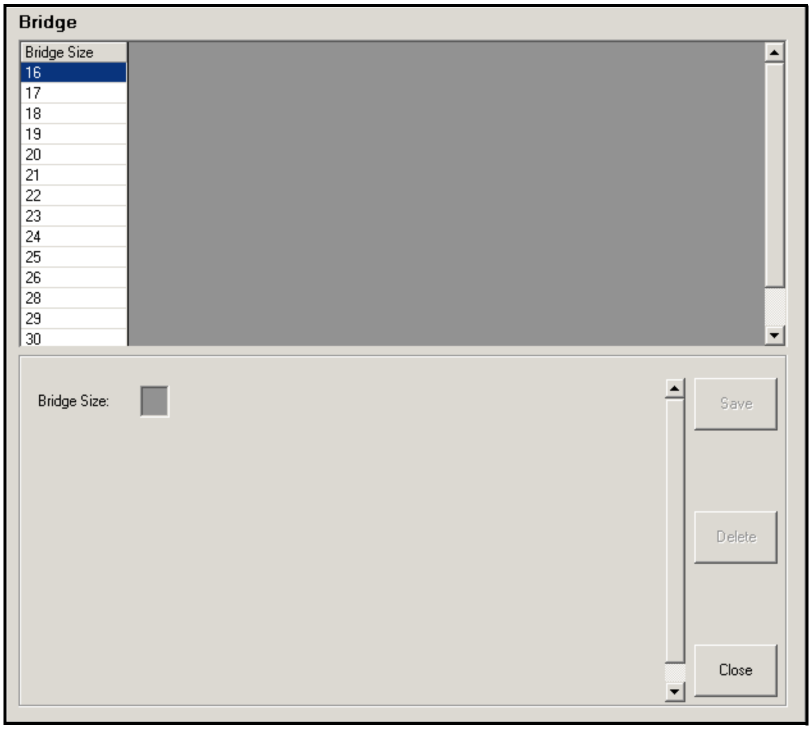

Figure 1–24: Bridge Window

1.5.20 Eye Sizes

Follow the steps below to add eye size values:

1. Click the **Eye Sizes** button in the Value section of the Business Rules tab.
2. In the Eye Size picklist, double-click the add line entry.
3. Enter the Eye Size value.
4. Click **Save**.

Note: To edit an eye value, double-click the value and update the applicable fields.

Note: To delete an eye size value, select the Eye Size entry and click **Delete**.

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5. Click **Close** to return to the Business Rules tab.

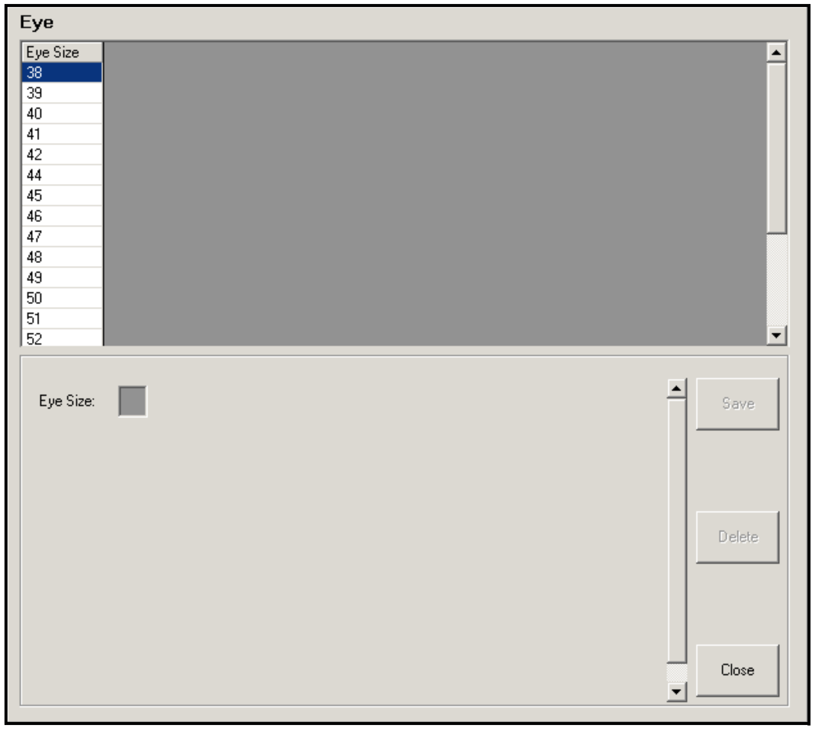

Figure 1–25: Eye Window

1.5.21 Order Statuses

Follow the steps below to add order status values:

1. Click the **Order Statuses** button in the Value section of the Business Rules tab.
2. In the Order Statuses picklist, double-click the add line entry.
3. Enter the Order Status value.
4. Enter a Description of the order status value.
5. Click **Save**.

Note: To edit an order status value, double-click the value and update the applicable fields.

Note: To delete an order status value, select the Order Status entry and click **Delete**.

6. Click **Close** to return to the Business Rules tab.

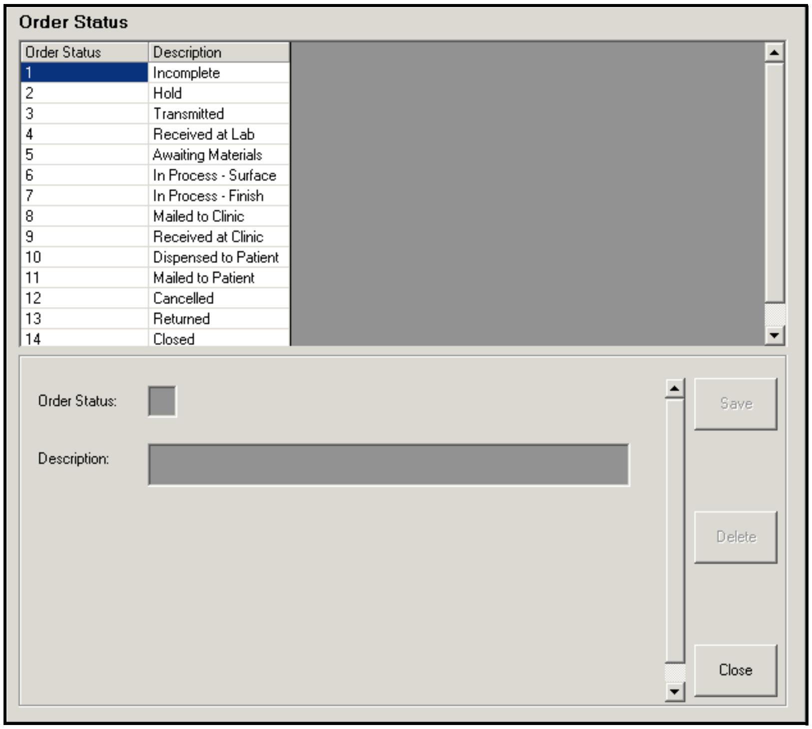

Figure 1–26: Order Status Window

1.5.22 Comments/Reasons

Follow the steps below to add comment type values:

1. Click the **Comments/Reasons** button in the Value section of the Business Rules tab.
2. In the Comment Type picklist, double-click the add line entry.
3. Enter the Comment Type value.
4. Enter any Comment Text associated with the value.
5. Click **Save**.

Note: To edit a comment type value, double-click the value and update the applicable fields.

Note: To delete a comment type value, select the Comments/Reasons entry and click **Delete**.

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6. Click **Close** to return to the Business Rules tab.

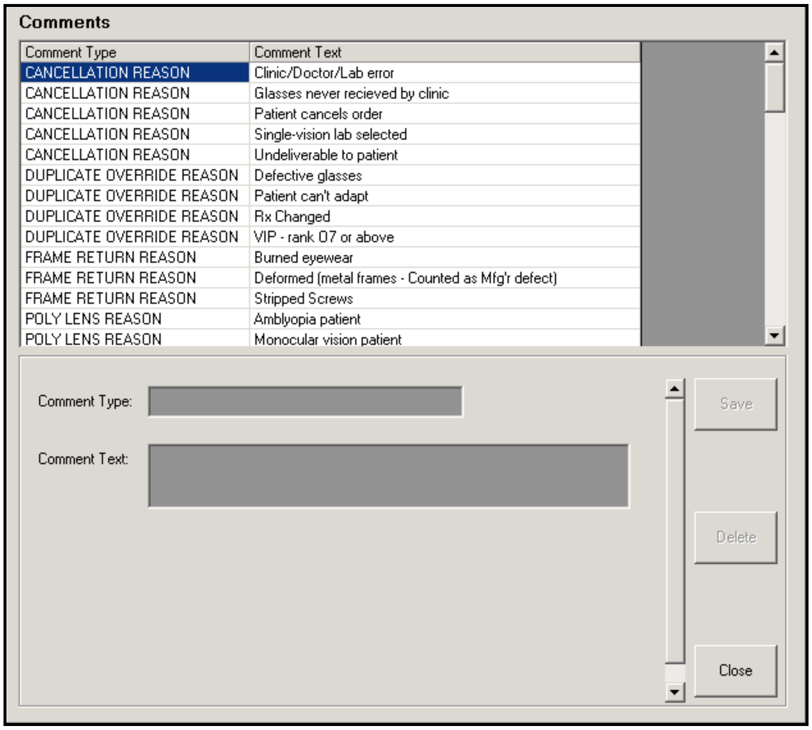

Figure 1–27: Comments Window

2.0 SRTS II ORDER ENTRY

2.1 SRTS II Order Entry Overview

SRTS II Order Entry (OE) allows eyewear to be ordered for individual patients. Orders can be started new or may be duplicated from previous orders. Orders can be placed within an AHLTA patient encounter (through the Order Eyewear tab of the Assessment and Plan (A/P) module) or outside of an encounter (throughout the SRTS II OE screen). The Order Entry module displays all of the selected patient's previous eyewear orders at the bottom of the screen.

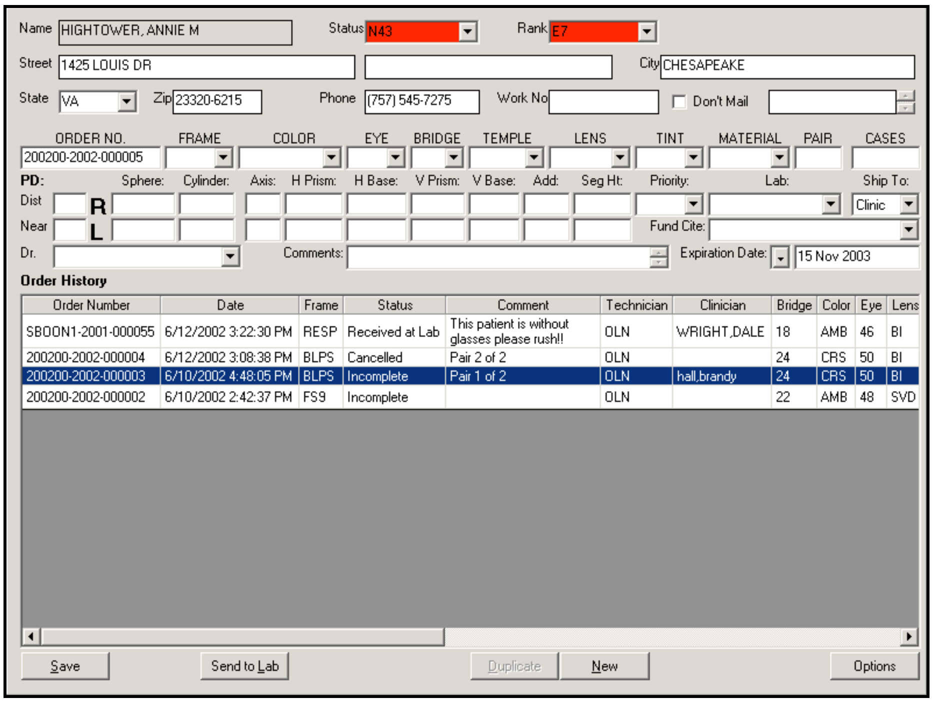

Figure 2–1: SRTS II Order Entry Window

2.2 Accessing SRTS II Order Entry

There are multiple ways to access SRTS II OE. Each method takes you to the SRTS II Order Entry window.

- If you have an encounter open, using the Folder List, expand the **A/P** folder and click **SRTS II OE**.
- If you have an encounter open, in the encounter document, click **A/P** to open the A/P module and select the **Order Eyewear** tab.

- If you are in the SRTS II OM window, select an order and click **Order Entry**.

Note: The SRTS II OE window contains the previous prescription information for a selected order. If this is the first prescription for the patient, the fields are empty.

2.3 Setting SRTS II Order Entry Properties

The SRTS II Order Entry Properties window allows you to customize the displaying columns of the patient order history grid. It also allows you to enable/disable two optional features: using favorite frames to pre-populate frame information upon loading, and automatically populate frame information when selecting/entering a frame type. This window also provides authorized users with access to SRTS II Administration.

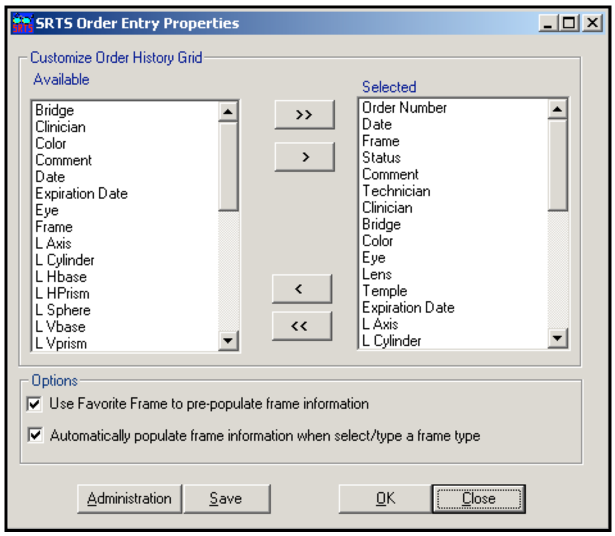

Figure 2–2: SRTS II Order Entry Properties Window

Follow the steps below to set SRTS II OE properties:

1. On the Order Eyewear tab, click **Options** to open the SRTS II Order Entry Properties window.
2. In the Customize Order History Grid Available picklist, select fields you want displayed to show order information.

3. To move the field(s) to the Selected picklist, click >.

Note: To select more than one field option, press the **Shift** or **Ctrl** key on your keyboard while selecting field options.

Note: To move the entire Available picklist to the Selected area, click >>.

4. If you want to have your Favorite Frame to pre-populate frame information, select that option.

Note: The Favorite Frame can be selected from the Frame Defaults tab of the SRTS II Administration module.

5. If you want to automatically populate frame information when you select a frame type, select that option.

Note: The frame information will automatically populate based on the information designated in the Frame Defaults tab of the SRTS II Administration window.

6. Click **Save**.
7. To return to the Order Eyewear tab, click **OK** or **Close**.

2.4 Creating a New Order

If SRTS II OE is accessed from the OM module, it will display the information from that selected order. If OE is accessed via the Folder List or the A/P module, the order fields will be blank, ready for you to enter a new order.

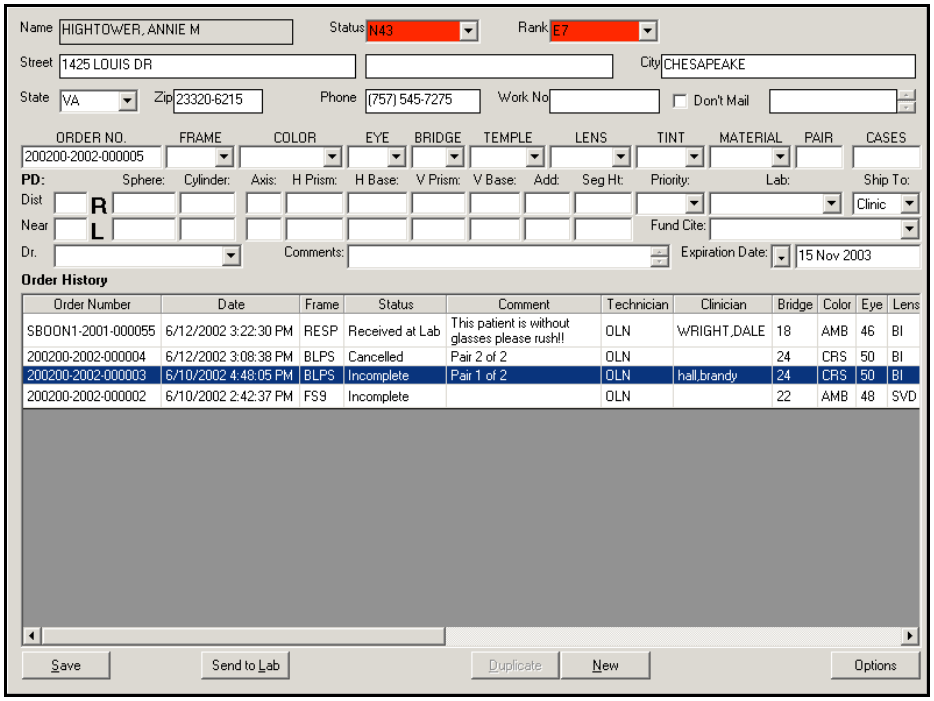

Figure 2–3: SRTS II Order Entry Window

Follow the steps below to order eyewear:

1. On the action bar, click **New**.

Note: The patient's demographic information is automatically populated from his or her record. If you modify the patient's information, it applies to the eyewear order only. If you modify the patient's address, when the order is saved, a message displays asking if the new address should be applied to all current orders. Click **OK** to apply the address to all current orders, or click **Cancel** to use the address only for the order being established. If you click **OK**, orders that are still being processed will be updated with the new address information.

2. Select a Status from the drop-down list, if necessary.
3. Select a Rank from the drop-down list, if necessary.
4. Select a Frame from the drop-down list. This frame drop-down list displays the list of Frame Defaults.

Note: If you have selected your Favorite Frame to automatically populate, the frame fields will be populated.

A yellow information box displays next to a frame if there are comments associated with the frame in the Frame Defaults list in SRTS II Administration. To view all available frames for this patient, click **All Frames**.

If a selected frame is only available for specified personnel or there is a different type of restriction, a verification prompt displays. Click **Yes** to continue or **No** to select a different value.

If an FOC frame is being issued within 12 months of the patient being issued a previous FOC frame, an FOC Validation message displays. Click **Yes** to select a reason for the second FOC and override the FOC validation or **No** to select a different frame.

5. Select a Color from the drop-down list, if necessary.
6. Select an Eye size from the drop-down list, if necessary.
7. Select a Bridge size from the drop-down list, if necessary.
8. Select a Temple size from the drop-down list, if necessary.
9. Select a Lens type from the drop-down list, if necessary.
10. Select a Tint type from the drop-down list, if necessary.
11. In the Pair field, enter a quantity for the number of glasses you want to order, if necessary.
12. In the Cases field, enter a quantity for the number of cases you want to order, if necessary.
13. Enter applicable Right eye measurement information.
14. Enter applicable Left eye measurement information.
15. Select Priority Code, if necessary.
16. Select the Lab from the drop-down list.
17. Select the Ship To location.
18. Select the Fund Cite from the drop-down list.
19. Select the Doctor from the drop-down list (or type in the doctor's name if the prescription is from a doctor not on the list).
20. Enter any Comments, if necessary.
21. Select an Expiration Date, if necessary.
22. Click **Send to Lab**.
    - If you want to save the order information but not send the order to the lab, click **Save**.
    - If you want to create another order using the same information, click **Duplicate**.

Note: The order displays in the Order History area. To determine what fields populate the Order History tab, click **Options**.

2.5 Editing an Order

SRTS II allows you to edit saved and transmitted orders; however, you can only edit orders associated with your facility.

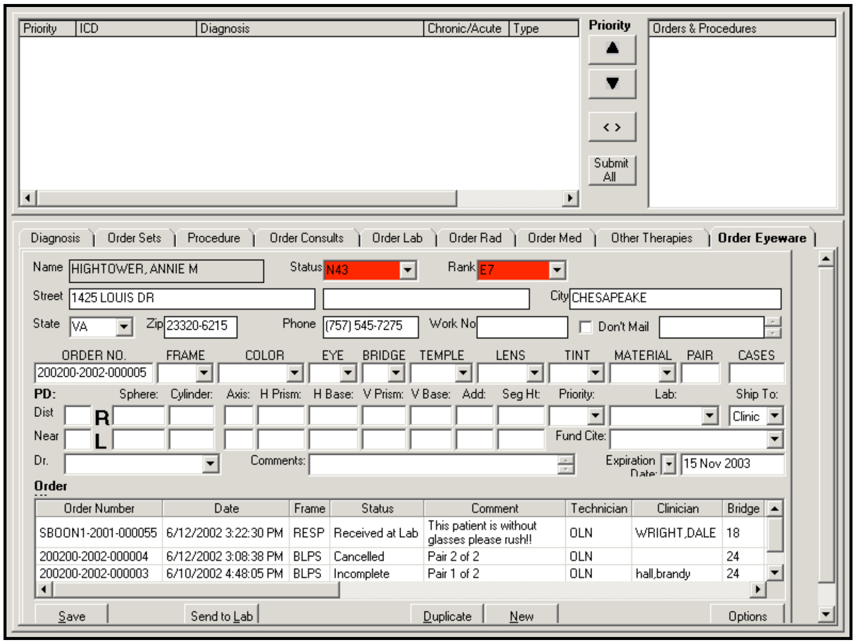

Figure 2–4: SRTS II Order Entry Window

Follow the steps below to edit a SRTS II order:

1. In the Order History area, select the order you want to edit.
2. Click the **Edit** action icon or double-click the selected order in the Order History Grid. The order entry fields populate with the selected order's data.
3. Update the Order fields, as necessary.
4. Update the following Right and Left eye measurement fields, as necessary.
5. Click **Save** or click **Send to Lab** if the order is ready for fabrication.

2.6 Measurements

Measurement	AHLTA Range	Normal Range	Comments
PD Distance	• 45 – 81	• 58 – 72	
PD Near	• 42 – 78	• 55 – 69	
Sphere	• 0.25 – 20.00 divisible by 0.25		Use + or - with a numeral or enter PLANO or Bal
Cylinder	• 0.25 – 12.00 divisible by 0.25		System will round the value to closest acceptable value. Value of “sphere” is allowed.
Axis	• 1 – 180		
H Prism	• 0.25 – 15.00 divisible by 0.25		
H Base			Must enter I or O. Cannot be entered without H Prism. Cannot be blank if H Prism has been entered.
V Prism	• 0.25 – 15.00 divisible by 0.25		
V Base			Must enter a D or U. Cannot be entered without V Prism. Cannot be blank if a V Prism has been entered.
Add	• 0.75 – 5.00 divisible by 0.25		
Segment HT	• Range is dependent on the type of frame and lens selected		Value of '3B” is allowed.

3.0 SRTS II Order Management

3.1 SRTS II Order Management

SRTS II is used by a clinic or fabrication lab facility to monitor, search, and update clinical eyewear orders for patients. Patient orders for a facility are based on the facility profile. If the EA has not set the facility profile, the clerk, technician, and/or the provider cannot view, modify, or update patient data. Once the initial setup has occurred, the first user to log on must set up the clinic profile by adding providers and labs in the Facility Profile tab of the Administration module. In addition, authorized users may then modify their facility's profile.

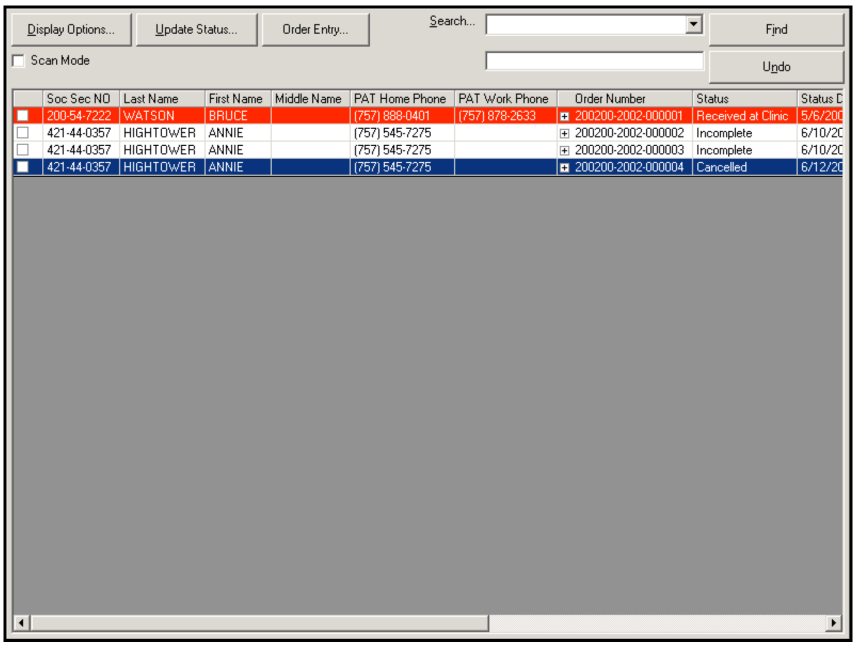

Figure 3–1: SRTS II Order Management Window

3.2 Accessing SRTS II Order Management

The SRTS II Order Management (OM) window is the main window you view when entering SRTS II OM if the facility is set up. It features search capabilities, navigation to SRTS II OE, as well as links to change the view displayed in the grid and the ability to update the statuses of eyewear orders.

Click **SRTS II OM** in the Folder List to access SRTS II OM.

Note: You do not need to have a patient selected or a patient encounter open to access the SRTS II Order Management module.

3.3 Setting SRTS II Order Management Display Options

The SRTS II OM Display options allow you to set default order management selections to filter what information is displayed on the OM screen. This filtering allows you to customize your view of certain types of orders or to find a specific order.

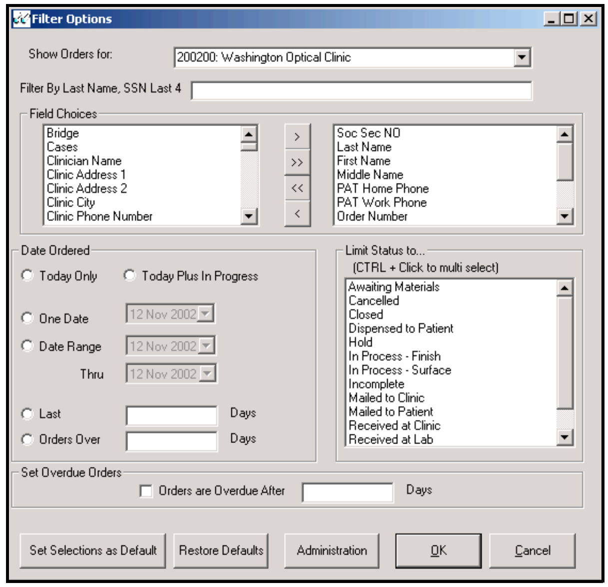

Figure 3–2: Filter Options Window

Follow the steps below to set OM display options:

1. On the SRTS II OM window, click **Display Options** to open the Filter Options window.
2. Set default selections for the following:
   - **Show Orders For:** Allows you to select to view orders generated by a specific clinic or sent to a specific lab. Select a facility from the drop-down list.

Note: If you are at a clinic facility, you will only be able to select your own clinic facility and not any other clinics.

   - **Filter By Last Name, SSN Last 4:** Allows you to set your search criteria by patient's last name and/or last 4 digits of the patient's social security number.
   - **Field Choices:** Allows you to select which columns should appear on the Order Management window. Use the < > icons to display or remove fields from the Order Management window.
   - **Date Ordered:** Select a date parameter option. Choices include the following:
     - **Today Only:** Orders for today only.

   - **Today Plus In Progress:** Orders for today and appointments that are still in progress.
   - **One Date:** Select a date from the drop-down list.
   - **Date Range:** Select a date range from the drop-down list.
   - **Last:** Specify an exact number of days from the past (e.g., enter 4 days and the system displays orders from the previous 4 days).
   - **Orders Over:** Specify an exact number of days old (e.g., enter 4 days and the system displays orders that are 4 days old or older).
- **Limit Status To:** Select an order status from the pick list. The OM display will filter to display only the order with the specific status(es).
- **Set Overdue Orders:** Select the Orders are Overdue After option or enter a specified number of days. Any overdue orders within the specified period are displayed.

3. Click **OK**. The settings are applied until you exit the OM screen. The default settings return the next time you access the module.
   - To set the selected filters as your default for each time you enter the module, click **Set Selections as Default**.
   - To restore the original system defaults, click **Restore Defaults**.
   - To navigate to the SRTS II Administration module, click **Administration**.

3.4 Updating the Status of an Order

Authorized users may update order statuses on an individual level, or in batches manually or by using a barcode scanner.

Follow the steps below to update the status of an order:

1. Select the checkbox of the order to be updated.
2. Click **Update Status** to open the Process Orders window.

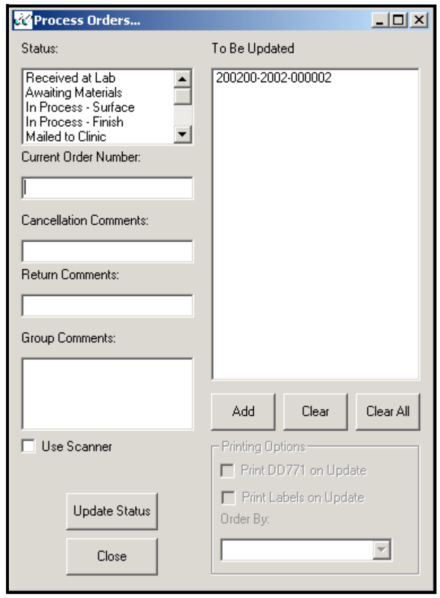

Figure 3–3: Process Orders Window

3. If there is an additional order to be updated, in the **Current Order Number** field, enter the order number for the order.
4. Click **Add**.
5. Repeat steps 3 and 4 to add additional orders that need to be updated.

Note: You can also select multiple orders to be updated by clicking each of their checkboxes on the OM screen.

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6. All of the orders will be listed in the To Be Updated area.
7. Select one or more of the status options that you want to apply to the identified orders.

Note: Printing options display depending on the selected status. You can select a printing option at the time you are updating the order status or you can select it at a later time. You can select to have the DD771 and/or address labels print when an order's status is updated.

Note: You can enter Group Comments that will apply to each of the orders to be updated.

Note: You can select the Use Scanner checkbox on the Process Orders window or the Scan Mode checkbox on the OM screen to then use the barcode scanner to select and update orders.

Note: Selecting the Canceled status displays the Select Cancellation Reason window. Select the reason the order is canceled and click **OK**. The cancellation reason displays in the **Cancellation Comments** field.

Note: Selecting the Returned status displays the Select Return Reason window. Select the reason the order was returned and click **OK**. The return reason displays in the **Return Comments** field.

8. Click **Update Status** to update the orders.
9. Click **Close** to return to the OM screen.

3.5 Searching for a SRTS II Order

SRTS II OM allows you to search for orders based on the following:

- Order number
- Patient's last name (minimum of first two letters)
- Patient's SSN
- Quick Search (first letter of patient's last name/SSN last 4)

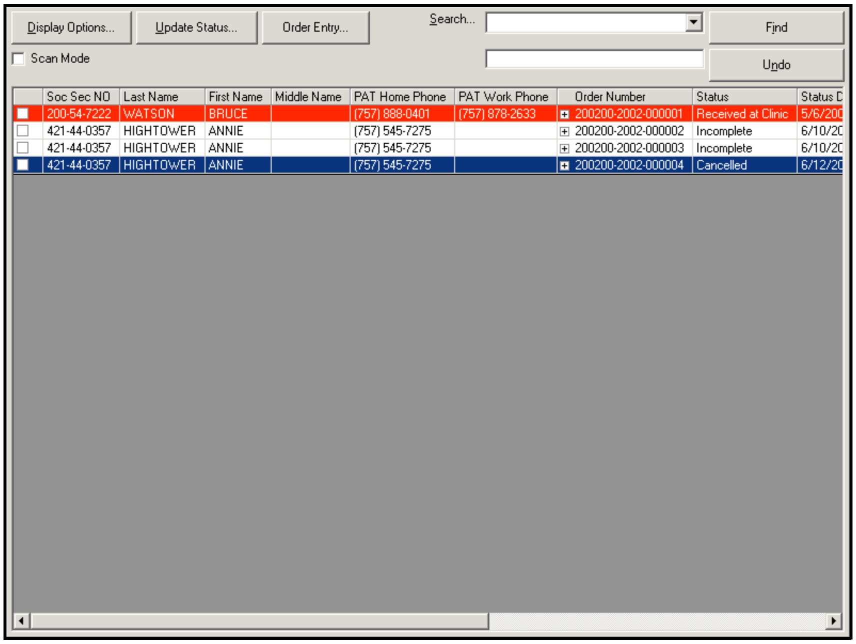

Figure 3-1: SRTS II Order Management Window

Follow the steps below to search for an order:

1. On the SRTS II OM window, select a Search option from the drop-down list.
   - If you select Order Number, enter the number in the corresponding **Search** field.
   - If you select Patient Last Name, enter the name in the corresponding **Search** field.
   - If you select Social Security Number, enter the number in the corresponding **Search** field.
   - If you select Quick Search, enter the patient's last name and/or the last four digits of the SSN in the corresponding **Search** field.
2. Click **Find**. The search results display in the SRTS II OM window.